Spirion: How to Perform a Search

Scope: SO, CCC	Revision Date: 1/22/2019

Table of Contents

1. Introduction

Once you are familiar with the layout of the Spirion Client as documented in the Introduction to the Spirion Client document, you are ready to customize different searches in order to search the different locations that have the potential to contain identity data.

This is a quick reference guide to performing a search for quickly getting started searching with the Spirion client. If you wish to have step-by-step instructions for performing popular searches, refer to the Searching with the Spirion Client document.

View the complete Spirion documentation to find other useful documents when using Spirion as well as how to handle the results of the searches performed by referring to the Handling Spirion Results document.
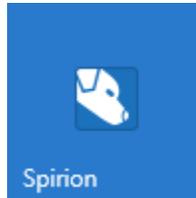
2. Intended Audience

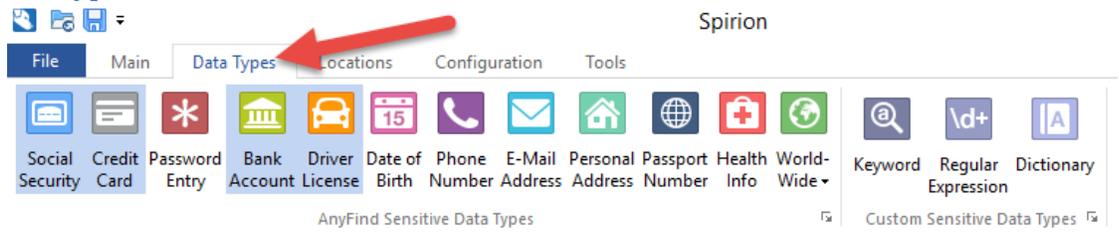The intended audience for this procedure is:

- System Office and CCC

3. Procedure

Launch the Spirion client

Open Spirion and enter your profile password (note this is NOT your NetID password).

Select data types

1. Click on the **Data Types** tab.
2. By default, DCL3 data types (SSN, Credit and bank accounts and driver licenses) are enabled by policy, but if other identity data types were added and saved to your profile, decide which identity data types you are searching for and disable any others (i.e. password, date of birth) that you do not want to search for.

Select location type and define locations to search
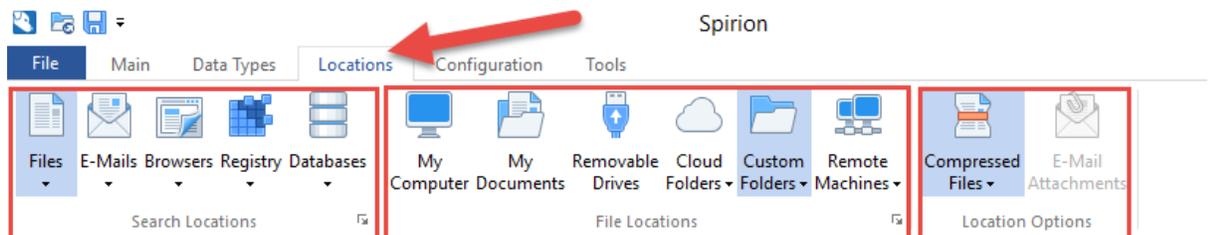
1. Click the **Locations** tab.
2. In the Search **Locations** section, select the location(s) you wish to search*:

   ***Locations shown are based on the location types you have been allowed to select. It may be different than the screenshot above. At least one search location must be selected (highlighted in blue)**

   ➢ If you wish to search files – click the top part of the Files button.

- When performing a file search, try to close as many other applications that may lock files and prevent them from being searched when you start your search.
- If you wish to search email – click the top part of the E-Mails button.
  - Refer to the [Spirion email search](#) documentation for details on how to search various email locations (O365 mailbox and Outlook Data Files).
- If you wish to search both file and email, make sure both are selected
  - See both notes above.
- If you will be using the Databases location (assuming it is an available location for your workstation), it is recommended to disable Files and Emails and just perform the database search. You'll notice when you disable Files and Emails, both File Locations and Location Options to the right are also disabled (My Computer, My Documents, etc and Compressed and Email Attachments) as those only apply when you are searching Files and Email locations. You will be prompted to configure the database type and connection string in order to search databases.

3. In the **Location Options** section, enable location options:

- Select **Compressed Files** to also search compressed files (recommended)
- Select **E-Mail Attachments** if you also wish to search attachments when performing an email search (recommended)

4. In the **File Locations** section, select the location you wish to search for identity data. NOTE: You can only select one location at a time.

- If you wish to search your local workstation, select "My Computer"
- If you wish to search your documents, select "My Documents"
- If you wish to search removable drives attached to your computer (i.e. DVDs, thumb drives, etc), select "Removable Drives" but make sure the removable drive has already been connected to your workstation prior to launching the Spirion client. If it has not, it won't be searched and you'll need to close the Spirion client, attach the removable media and launch the Spirion client again.
- NOTE: Do not enable the Cloud Folders location as it does not currently support OneDrive for Business and is only looking for personal OneDrive locations.
- You will want to use Custom Folders when you want to search multiple locations during one search (for example a thumb drive and your computer's hard drive) or when you want to search specific folders or locations that are not listed on the File Location tab (My Computer, My Documents or Removable Drives).

 A separate document for [searching department shares](#) is available as a Quick Reference Guide.

Click the top part of the "Custom Folders" button to enable a Custom Folder search, then use the dropdown under Custom Folders to customize the folder list:

1. Enter custom locations to include or exclude in the **Folder** field and click the **Add** button. (If you wish to exclude a location from being searched, before clicking Add – check **Add as Exclusion**). You may want to exclude a certain subfolder from being searched. For example: You add the X:\ drive but want to exclude an X:\SoftwareExecutable folder that is below the X:\ drive because it does not contain data that may contain DCL3 data.

2. When you are done entering your locations, click the **OK** button.
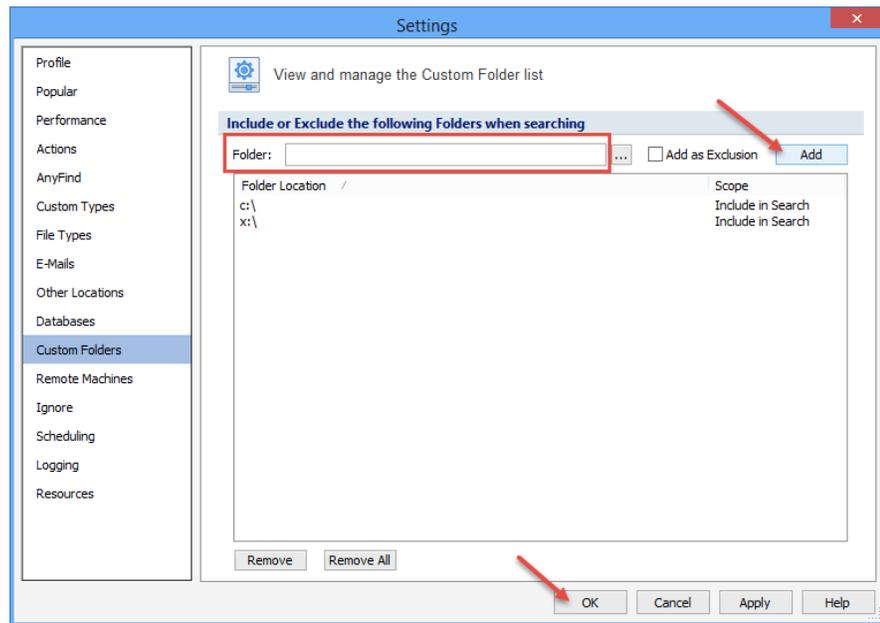

Note that once you customize the folder list, it will be saved each time you launch Spirion, so you can make changes to it as needed or remove all customized folder locations by clicking **Remove All.**

Start the search
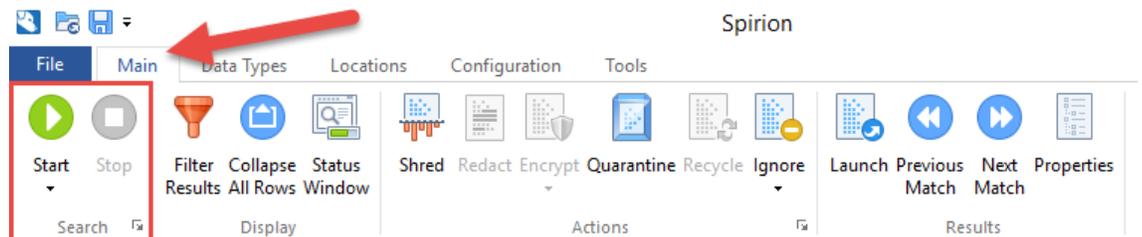
1. Click on the **Main** tab.
2. Click on the **Start** icon to begin the search.
3. Spirion will begin searching. You will see a Spirion **Status** window where you can track the search progress:
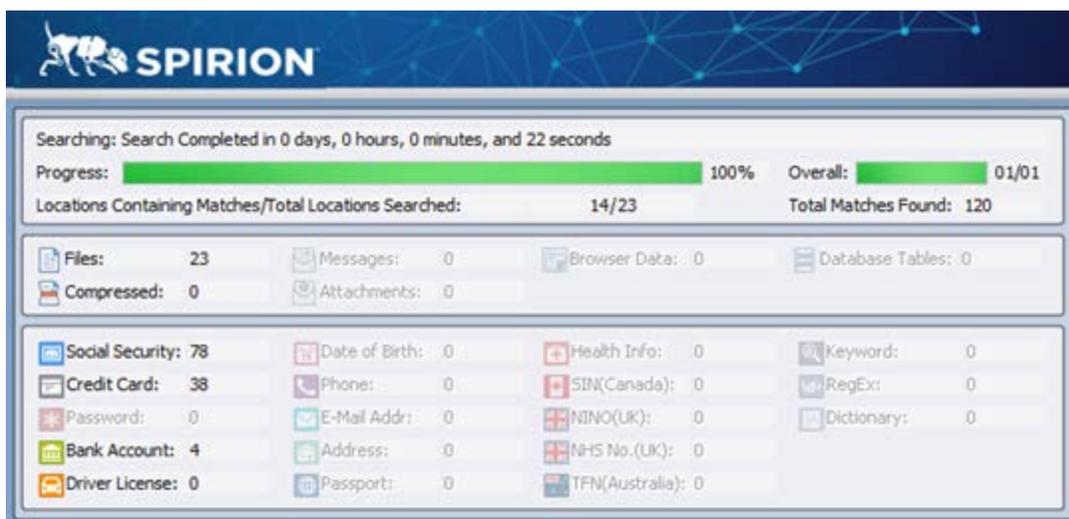
*If more details are needed, see the **Status Window** section of the Introduction to the Spirion Client.

Perform actions on the search results

You will be presented with the Search Summary Window:
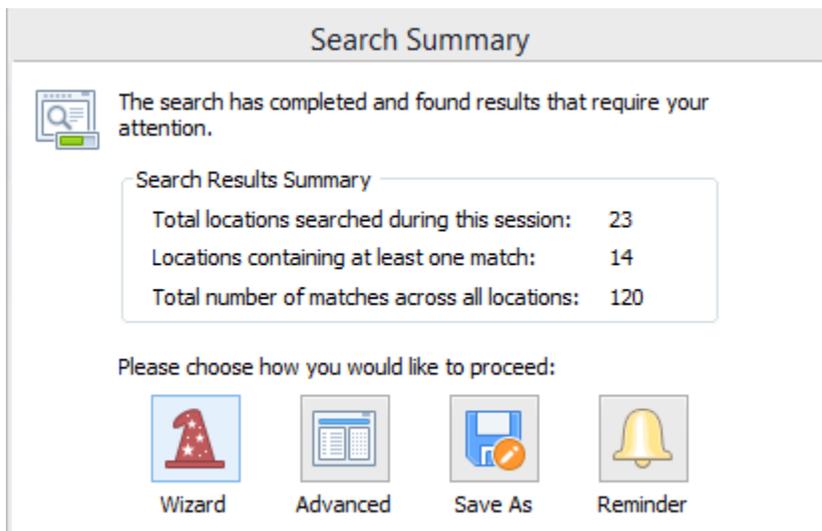
*If more details are needed, see the **Status Window** section of the Introduction to the Spirion Client.

Select **Advanced** to view the results of the search in the Results Window. Using the **Action Decision Table** found in the **Handling Spirion Results** document, use the actions found in the **Actions** section of the **Menu** tab to work with the results.